

- ✓ Configured Cherwell Service Management into a CRM tool
- ✓ Instituted an SLA of two-day processing (originally six days)
- ✓ Recording 10-20 times more data than they could with their previous solution
- ✓ Processed over 20,000 certifications in six months due to streamlined processes and automations

The Challenge

The National Swimming Pool Foundation (NSPF) provides pool management training, including emergency response planning; chemical use; and water safety for pools, water parks, and spas. NSPF educates and certifies instructors in all 50 states and 96 countries. Currently, 883 active NSPF trained instructors teach classes in English, Spanish, French, Arabic, Bulgarian, Cantonese, Chinese, Czech, Greek, Korean, Polish, Portuguese, Russian, Serbian, Slovak, and Ukrainian to potential certified pool managers. NSPF uses Cherwell Service Management as a customer relationship management (CRM) tool to manage, support, and process certifications for their instructors and students, orders for training courses and materials, CEU certificates, troubleshooting customer requests, and more.



NSPF's previous solution was a homegrown database from 1985. The system could not add separate certifications under the same person's record. Since certifications only last five years, the system perpetuated duplicate records for an individual with each renewal. The old system also limited the processing of courses to one course, meaning the other 59 courses developed by NSPF had to be tracked and processed manually. Due to the outdated system, processing and issuing certifications was an extended sixday job. NSPF understood that an improved IT solution would lead to a radically more efficient and timely process.

The Solution

NSPF searched for an ITSM tool that would provide the configurability necessary to adapt to their unique process. According to customer fulfillment manager, Ray Perkins, "We looked at several solutions, but Cherwell Service Management was the only one that could even touch what we needed to do." Perkins configured Cherwell into a CRM tool, and NSPF integrated a clean, de-duped set of records into the system.

Using Cherwell, NSPF created course dashboards to tell them how many certifications are awaiting processing. After receiving the roster, payment, and exams from the instructor, NSPF now changes the status to INTAKE, and the race to speedily process and send out certifications begins. NSPF also inputs students' raw score data into the system and runs analysis on their instructors' performance.

The Results

NSPF has cut their processing time from six days to 0.88 days since using Cherwell Service Management. Originally, Perkins promised a three day turnaround to process certification courses. Now, it is down to only two. With the improved process NSPF can quickly turn around the large number of processing requests, receiving up to 800 certifications per day. From January to June, their busiest stretch, Perkins and only three other employees process over 20,000 certifications.

The streamlined process not only allows for faster processing, but fuller information recording as well. Their ability to easily configure Cherwell Service Management resulted in more information in the system. "We're recording ten to twenty times more data than we did before because we can customize Cherwell Service Management to do what we need," Perkins said. For example, Perkins can easily change the fields in Cherwell Service Management. "Give me five minutes and I can get it done."

The Future

Now that NSPF has moved from a reactive to proactive response to the onslaught of certifications, Perkins and his team will tackle configuring Cherwell Service Management into a full blown customer relationship management tool. Also on the horizon, NSPF will investigate how to use Cherwell for marketing capabilities and management of e-mail campaigns.

